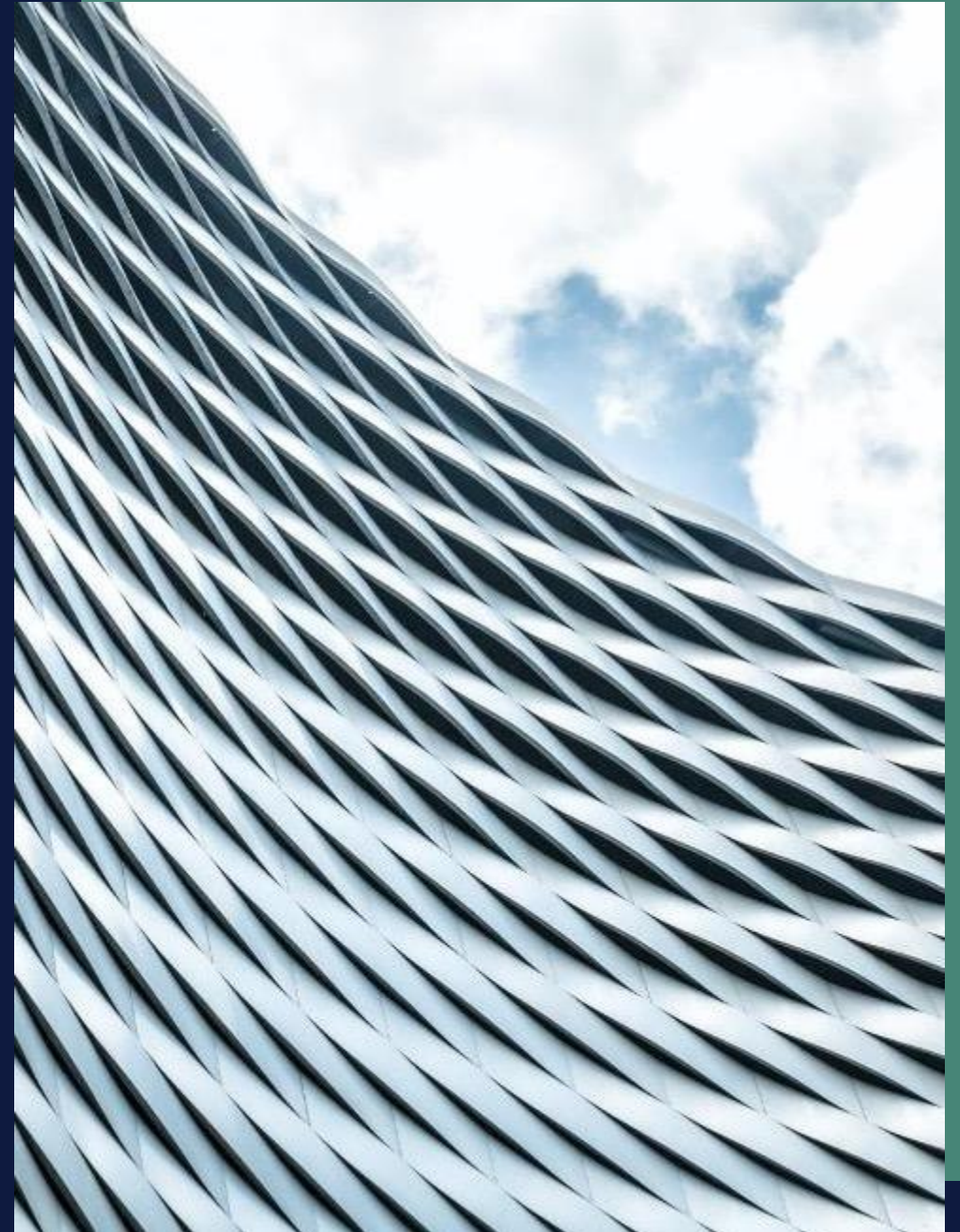


EXCELLERATE

Group supplier Portal

Guide to Registration



QUERIES



Queries

General

Any queries can be referred to one of our call Centre agents:

Email: supplier.onboarding@epsgroup.co.za or call any of the following numbers:

- Janice Bowes: (011) 911 – 8449
Janice.Bowes@excelleratejhi.com
- Dima Lusiba: (011) 911 - 9694
Dima.Lusiba@excelleratejhi.com
- Michael Davis: (011) 911 – 8326
Michael.Davis.@excelleratejhi.com
- Zanele Mplophe: (011) 911 – 8493
Zanele.Mplophe@cbreexcellerate.com
- Tebogo Makgeta: (011) 911 - 8240
Tebogo.Makgeta@cbreexcellerate.com



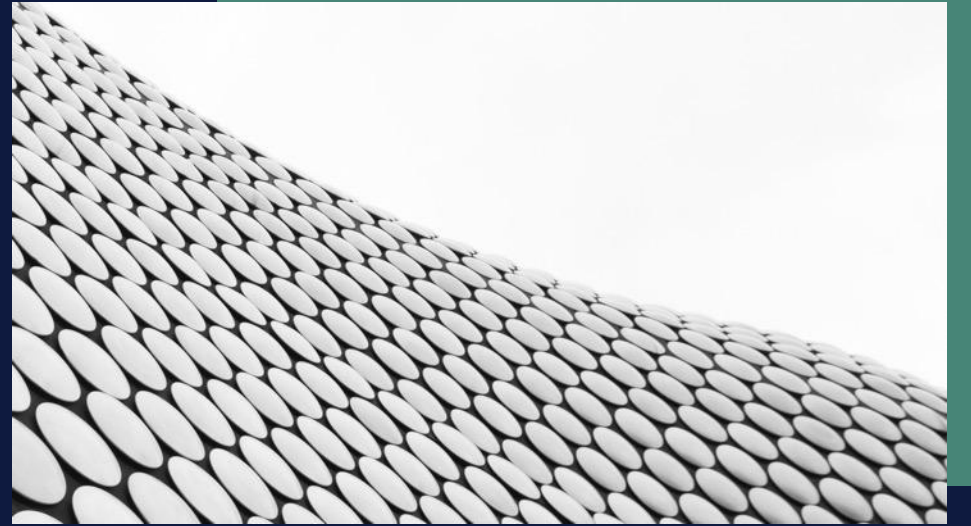
Queries

Health & Safety

Any queries relating to Health & Safety, Environment Assessment (Section 4), refer to the following agents:

- Thato Nkwana:
Thato.Nkwana@cbreexcellerate.com
- Lerumo Sekhukhune:
Lerumo.Sekhukhune@cbreexcellerate.com
- Boipelo Tsatsane:
Boipelo.Tsatsane@cbreexcellerate.com
- Amy Ngobeni:
Amy.Ngobeni@cbreexcellerate.com
- Mpho Mutondwani:
Mpho.Mutondwani@cbreexcellerat.com

Please also refer to the Portal Registration FAQ guide at the bottom of the Overview page.



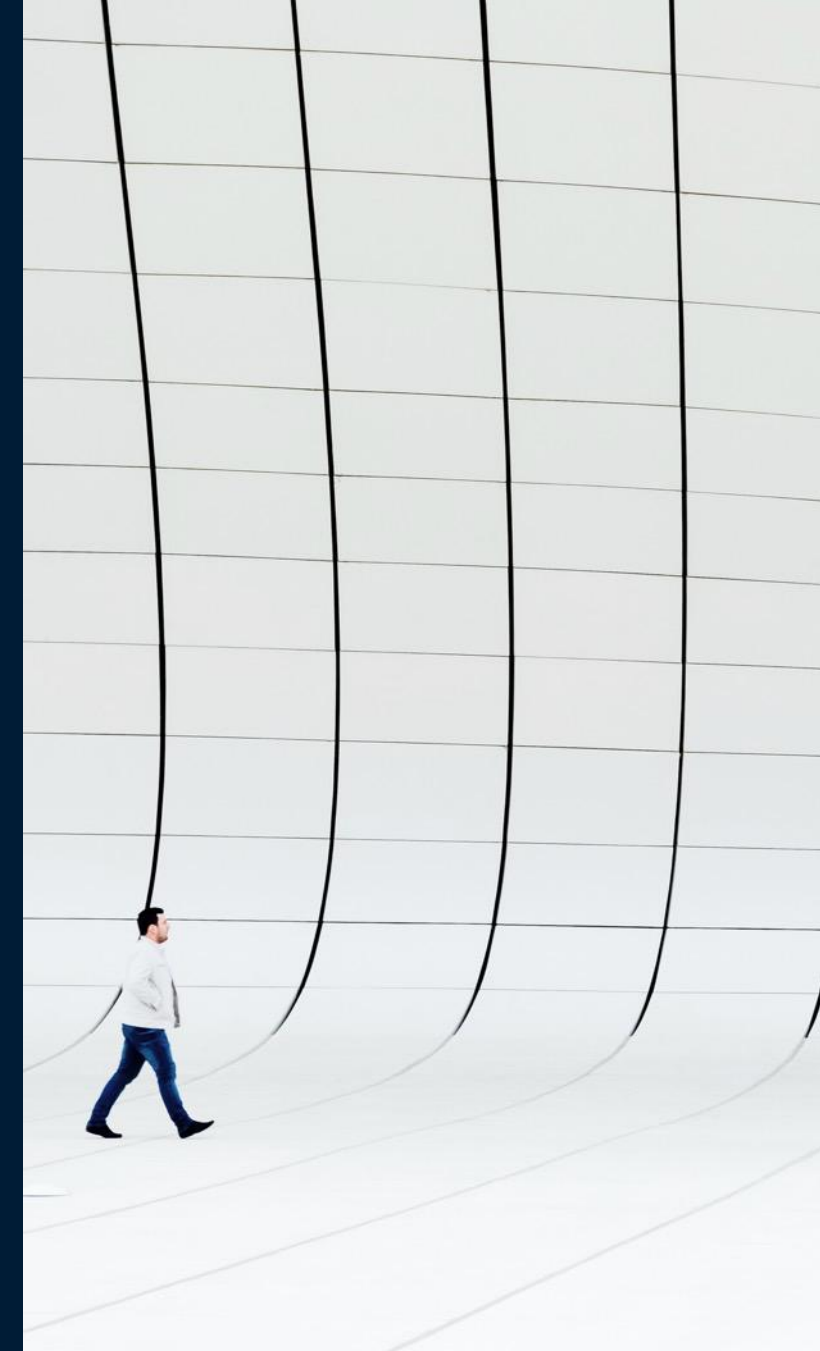
REGISTRATION

STEPS






Steps to Register

1. Access Google Chrome or Microsoft Edge (this unfortunately does not work in Internet Explorer).
2. Enter supplier portal registration link:
<https://supplierportal.excellerate.tech/Identity/Account/Register>
3. You need to register with a unique email address. You can register only once.
4. Enter a unique email address and password. Confirm your password.
5. Click “I am not a robot” (reCAPTCHA). If prompted by reCAPTCHA to select pictures, please follow the requirements.
6. Click register and the system will redirect you to the registration Overview Page.
7. Complete all the information in steps 1 to 8 and attach the relevant documents, remembering to click the save button on the bottom of each step.
8. You do not have to complete the entire form in one sitting. You can return to the portal by entering <https://supplierportal.excellerate.tech/Identity/Account/Login>, enter your email address and password that you registered with and login.



Steps to Register

- 9. If everything has been completed successfully, each step on the Overview Page will have a  indicating that it is has been completed in full.
- 10. If “Submitted for Approval” has a  against it, it means the registration has not been submitted.
- 11. Press the  button at the bottom of the Overview Page when complete.
- 12. Once submitted, your application will then be routed to our Procurement team to be reviewed and vetted.
- 13. If successful you will receive new login details to login to the main portal. If you are not successful, you will receive feedback from our Procurement team.

Please review and action incomplete items below

-  Step 1 (General Info)
-  Step 2 (Ownership)
-  Step 3 (References)
-  Step 4 (QHSE)
-  Step 5 (B-BBEE)
-  Step 6 (Declaration)
-  Step 7 (Anti-Corruption)
-  Step 8 (Documentation)
-  Submitted for Approval





OVERVIEW

PAGE




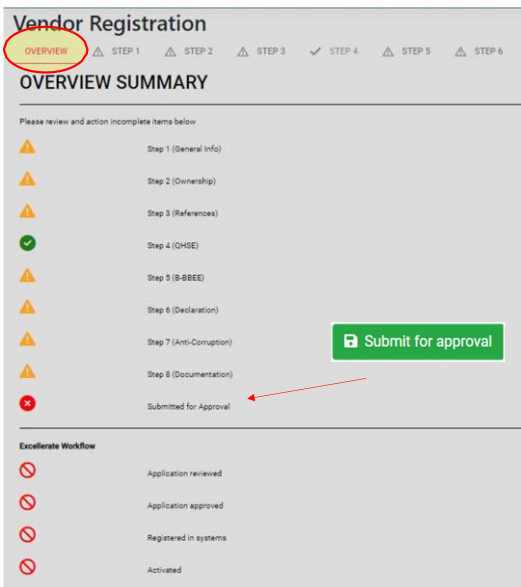
Overview Page

This is the 1st screen you will see.

At the start of the process, you will notice a  against step 4 (QHSE). Once the supplier selects the relevant service category in step 1, this step will change to  until such time as the relevant info is updated on step 4.

As the various steps are completed correctly, the  will change to .










If any of the steps have a  sign, then your information for that step is incomplete and you will need to revisit that step until you get the green light. You are welcome to contact our call centre to assist should you have difficulties in completing the steps



Vendor Registration





OVERVIEW SUMMARY

Please review and action incomplete items below

	Step 1 (General Info)
	Step 2 (Ownership)
	Step 3 (References)
	Step 4 (QHSE)
	Step 5 (B-BBEE)
	Step 6 (Declaration)
	Step 7 (Anti-Corruption)
	Step 8 (Documentation)
	Submitted for Approval

[Submit for approval](#)

Excellerate Workflow

	Application reviewed
	Application approved
	Registered in systems
	Activated



STEP 1: GENERAL INFORMATION

Supplier Legal Name	<input type="text"/>	Supplier Trading Name	<input type="text"/>
Supplier Registration Date	2022/09/08	Registration Type	<input type="text" value="Company"/>
Company Reg Number	<input type="text" value="#####"/> <small>Company Registration Number (ex: XXXX XXXXXX XXX)</small>	Division of Holding Company	<input type="checkbox"/>
VAT Registration Number	<input type="text"/>	Listed Entity	<input type="checkbox"/>
Tax Registration Number	<input type="text"/>	UIF Number	<input type="text"/>
COIDA / WCA Number	<input type="text"/>	B-BBEE Level	<input checked="" type="radio"/> 0 (Not registered) <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8
Business Telephone Number	<input type="text" value="+XX XX XXX XXXX"/>	Total Staff Compliment	<input type="text" value="0"/>
Mobile Telephone Number	<input type="text" value="+XX XX XXX XXXX"/>	Business Fax Number	<input type="text" value="+XX XX XXX XXXX"/>
Contact Person	<input type="text"/>	Emergency Call Out Number	<input type="text" value="+XX XX XXX XXXX"/>
Email - Payment Remittance	<input type="text"/>	Email - Purchase Orders	<input type="text"/>
Physical Address	<input type="text"/>	Email - Statutory Documents	<input type="text"/>
Physical Post Code	<input type="text"/>	Postal Address	<input type="text"/>
Areas of Operation	<input type="text" value="SELECT AREA"/>	Postal Post Code	<input type="text"/>
Services offered	<input type="text" value="Select a service"/>		
Additional Services	<input type="text"/>		
Additional Services	<input type="text"/>		
	<small>Please upload a document detailing additional services your organization offers</small>		
	<input type="button" value="BROWSE..."/>		
<input type="button" value="Save"/>			

Co. reg. number – please note the format required

Please enter the VAT and Tax numbers as they appear on the certificates with no space, backslashes etc.

All telephone number to be entered in the required format

Please select company or individual, the co. reg. or ID number will reflect depending on your selection here

A BEE level must be selected at this step. If non compliant, please select a level between 5 and 8. If this step is left at zero, you will not be able to access step 5.

Services offered needs to be selected from the dropdown selection. If your service is not there, please select the closest service to yours and under Additional service below elaborate on the service you offer. IMPORTANT If a selection is not made here, steps 3 and 4 will be problematic.

You can upload additional documents detailing your services.

DON'T FORGET TO SAVE. If saved correctly, step 1 will have on the Overview page.

OVERVIEW ▲ STEP 1 ▲ **STEP 2** ▲ STEP 3 ✓ STEP 4 ▲ STEP 5 ▲ STEP 6 ▲ STEP 7 ▲ STEP 8

STEP 2 - OWNERSHIP STRUCTURE OF ENTERPRISE

List below all proprietors / partners / shareholders / members of the enterprise

+ Add ✎ Edit ✕ Cancel 🔄 Update

Initials & Surname	RSA ID Number	Citizenship	Ownership %	Race	Gender	Disability
No records to display						

Click on + Add button to add shareholder or owner detail.

ID number needs to be a South African ID, please enter with no spaces. If not a SA entity or individual, please leave ID number blank and fill in the rest of the fields.

IMPORTANT These details need to tie into the CK, CM, COR documents for your company.

If the applicant is an individual, you still need to complete these details by adding in your ID number and completing the other fields.

IMPORTANT Please click on the **update button** to SAVE before moving on to the next step. If you do not select update, your information will be lost.

OVERVIEW ▲ STEP 1 ▲ STEP 2 ▲ **STEP 3** ✓ STEP 4 ▲ STEP 5 ▲ STEP 6 ▲ STEP 7 ▲ STEP 8

STEP 3 - TRADE REFERENCES

List at least three trade references for your enterprise. **NB** If Excellerate is the first customer, please use Excellerate as a reference.

+ Add ✎ Edit ✕ Cancel ↻ Update

Company Name	Contact Name	Contact Number	Type of Service	Description of Work	Contract Value	Contract Date
No records to display						

Click on + Add button to add one or more references. You will at least need to add one reference.

The type of service must be selected from the dropdown box. Make sure you have selected your type of service in step 1 – this will influence the drop down options available

Enter a value with no spaces, comma's or full stops

Select the date from the calendar block provided. The date needs to be a date in the past - if you are currently doing the work, use the commencement date of the project

IMPORTANT Please click on the **update button** to **SAVE** before moving on to the next step. If you do not select update, your information will be lost.

STEP 4: QUALITY, HEALTH & SAFETY, ENVIRONMENT ASSESSMENT

Safety and the Environment: Our products, services and workplaces reflect our belief that what is good for the environment and the safety and health of all people is good for Excellerate. Our quality, health and safety management system describes how we turn this vision into reality by defining responsibilities at each organizational level and by giving clear direction on how to manage workplace risks through effective processes and procedures. We expect our contractors to share our commitment by confirming that they have appropriate health and safety procedures in place and will carry out their duties in a competent and diligent manner. In order to simplify this assessment you do not need to provide any supporting documents (certificates, statements, policies etc) with your questionnaire response. However if you answer yes to any questions you must have supporting documentation readily available as we reserve the right to seek further clarification or evidence of compliance.

Completed By	<input type="text"/>	Date Completed	<input type="text"/>
Job Title	<input type="text"/>	Phone	<input type="text"/>
Email	<input type="text"/>	Web Address	<input type="text"/>

Based on the services selected, we have calculated your highest risk category as:

Note number format, eg +27 83 654 5432

If you do not have a website, please leave this blank

Service Matrix

Please indicate the level of service

Activity Risk Level	A - Low Risk	A - Low Risk	B - Medium Risk	C - High Risk	C - High Risk
Service Description	Supply of goods to the site	Off site services	On site services	On site works	On site installations
Air-Conditioning (HVAC) Maintenance	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Pls select the relevant risk category

IMPORTANT **Step 3 (Trade References)** needs to be completed before any services will appear under the service matrix. The service you selected in step 1 will appear here.

STEP 4: QUALITY, HEALTH & SAFETY, ENVIRONMENT ASSESSMENT

PART 1: Performance

Have there been any fatal, major or significant injuries to employees of your business over the last 3 years? Yes No

Has there been any enforcement action(s) (prosecutions, notices, warning letters etc) involving your business or its employees over the last 3 years? Yes No

Is there any enforcement action pending? Yes No

If you have answered Yes to any of these questions then please provide brief details in the space below

If you have selected YES to any of the above questions, please provide details here

PART 2: Accreditation

Does your organization have a comprehensive documented safety management system? Yes No

The system has been externally certified as meeting the requirements of ISO 45001 Yes No

The system is compliant with the requirements of ISO 45001 (i.e. meets the requirements of the Standard) but external certification has not (yet) been sought Yes No

The system is not compliant with the requirements of ISO 45001 (please select this option if you are not familiar with the requirements of OHSAS 18001) Yes No

The system has been externally certified as meeting the requirements of ISO 14001 Yes No

The system has been externally certified as meeting the requirements of ISO 9001 Yes No

The system has been externally certified as meeting any other relevant standards, please name which ones

If you have selected YES to any of the above questions, please provide details here

Please upload any evidence

BROWSE...

PART 3: Management

 Save

IMPORTANT Please SAVE before moving on to the next step. If you do not, your information will be lost.

STEP 5: B-BBEE QUESTIONNAIRE

Existing vendors:
We thank you for the service / products you have provided us in the past as a valued service provider / vendor / supplier. We wish to continue to utilise your services / products, but due to changes in the BBBEE Codes we need to re-establish your current and future BBBEE status and future plans.

Potential vendors:
Under the new B-BBEE Codes, we are obliged to ascertain your potential B-BBEE value to our company.

Please upload your VALID B-BBEE Certificate as part of the document set.

Authorised Company Representative(s) **Position Held**

Contact Number **Date**

Questionnaire:

Charter / Sector Code Used

Multi National / Foreign Owned? Yes No **Local Ownership (%)**

Tax Clearance available? Yes No **Company Type:**

This information must tie up to your BEE certificate or affidavit

B-BBEE Development Plan:

If your current B-BBEE Level is 9, 8, 7, 6 or 5, please attach a short one-year turnaround strategy indicating how you will achieve at least a level 4. You may attach a separate report.

Please upload separate plan here

IMPORTANT Please SAVE before moving on to the next step. If you do not, your information will be lost.

If you are non compliant, then you can use this to detail any future plans to get to level 4 or above

OVERVIEW ⚠ STEP 1 ⚠ STEP 2 ⚠ STEP 3 ✓ STEP 4 ⚠ STEP 5 ⚠ **STEP 6** ⚠ STEP 7 ⚠ STEP 8

STEP 6 – DECLARATION OF INTEREST

In the interest of fairness and transparency, disclosure is required if a person wanting to register on the Excellerate database is having a kinship with employees in the service of Excellerate.

1. Are you or any person connected with the entity applying for database registration employed by Excellerate? Yes No

If the answer is **YES** then please provide an explanation below

If you have selected YES to any of the questions, please don't forget to provide details

2. Have you been in the service of Excellerate or any other associated entity for the past six months? Yes No

STEP 7: THIRD PARTY ANTI-BRIBERY AND CORRUPTION DECLARATION

Anti-Corruption
 We represent and agree that we, our affiliates, owners, directors, officers, employees, agents, intermediaries, subcontractors and service providers shall be bound by and abide with all applicable local and international anticorruption laws and regulations, including but not limited to strictly complying with the letter and spirit of OECD Convention on Combating Bribery of Foreign Public Officials, the UK Bribery Act and the US Foreign Corrupt Practices Act.
 We, our affiliates, owners, directors, officers, employees, agents, intermediaries, subcontractors and service providers will not pay money, promise to pay money, authorise to pay money or offer or promise anything of value to a person in a position of trust to unduly influence the judgement or conduct of that person. There are no payments. A person in a position of trust includes any public official, political candidate, political party, party official and private sector employee or individual.

If "NO" then please provide details

Depending on whether you've selected YES or NO, please provide details as required

Have any of your employees, directors, officers, shareholders, owners, affiliates or agents been subject to regulatory sanctions, penalties, debarments and/or professional suspensions related to bribery, money laundering, fraud or other relevant offenses?

 Save **IMPORTANT** Please SAVE before moving on to the next step. If you do not, your information will be lost.

STEP 8 - REQUIRED DOCUMENTATION

This section requires the submission of mandatory and applicable industry specific documentation. Please upload your documentation against each item where applicable. Kindly note that your registration might be rejected should any of the required documents not be submitted. Where applicable, provide proof of registration of membership should you not have received a membership certificate yet

Industry Documents	+
Documents Requiring Acceptance	+
Mandatory Documents	+
Documents Requiring Signature	+

Depending on the service selected in step 1, you will notice that you may have industry specific documents that you are required to upload. If this does not appear on your registration, then you may ignore this.

Industry Documents	
PSIRA Letter of Good Standing / Compliance	Review Document
SAQCC Membership	Review Document
CIDB Registration	Review Document
Electrical Contracting Board of South Africa registration Certificate	Review Document

IMPORTANT Please ensure that if a document has an expiry date, that you upload the date in the field required

STEP 8 - REQUIRED DOCUMENTATION

This section requires the submission of mandatory and applicable industry specific documentation. Please upload your documentation against each item where applicable. Kindly note that your registration might be rejected should any of the requirements should you not have received a membership certificate yet

Documents Requiring Acceptance

Please review the document for acceptance via the document link. Once reviewed signal your acceptance by clicking the Accept button

	Supplier Code of Conduct		
	Contract Code of Conduct		
	Standard Terms and Conditions		

Click to download the document for review

Documents

Supplier Code of Conduct

By accepting the Supplier acknowledgement, the Supplier acknowledges and is certifying that they have read and agree to the Supplier Code of Conduct ["SCOC"] and will apply it in all dealings with, for, or on behalf of, Excellerate or in connection with Excellerates' goods and services.

The Supplier acknowledges the importance of the SCOC to the proper conduct of business for and with Excellerate.

The Supplier understands the Supplier's obligations as set forth in the SCOC and commits to conduct business in accordance with the SCOC and to report all matters as they arise to the attention of Excellerate.

The Supplier acknowledges that Excellerate may, in its sole discretion, revise the SCOC from time to time.

The Supplier understands its responsibility to comply with the then current SCOC posted on Excellerates Supplier Portal website.

The Supplier acknowledges that failure to comply with the policies, procedures or other requirements of the SCOC may, in Excellerates's sole discretion, constitute cause for termination of any agreement by and between Excellerate and the Supplier on terms to be determined by Excellerate.

The Supplier understands that its agreement to comply with the SCOC for Suppliers does not obligate Excellerate to conduct business or place any orders with the Supplier.

Acknowledge






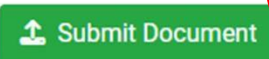

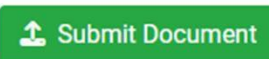

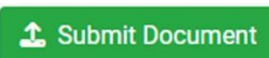

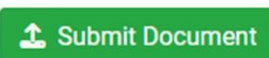

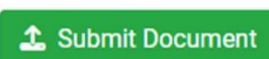



IMPORTANT The terms and conditions of each document need to be acknowledged by ticking the box showing your acceptance of the relevant terms

IMPORTANT Please SAVE before moving on to the next step.

STEP 8 - REQUIRED DOCUMENTATION

This section requires the submission of mandatory and applicable industry specific documentation. Please upload your documentation against each item where applicable. Kindly note that your registration might be rejected should any of the required documents should you not have received a membership certificate yet

Mandatory Documents

	CK, CM, COR Documents (Reflecting company details, shareholders, members) *	
	Valid Tax Clearance Certificate *	
	ISO Certification (if applicable) *	
	BBBEE Certificate (Independent Auditors Certification) / Sworn Affidavit *	
	Public Liability & Professional Indemnity Insurance Certificate (PL & PI) *	
	Letter of Good Standing (Valid and Current) *	
	Certificate of Compliance UIF *	
	Bank Letter confirming Banking Details (not older than 3 months) *	
	Company Letterhead *	

It is mandatory to complete each section and upload the relevant/applicable documents.

If a document is not applicable, you will still need to complete the details in each of the sections

OVERVIEW

STEP 1

STEP 2

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STEP 6

STEP 7

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STEP 8 - REQUIRED DOCUMENTATION

This section requires the submission of mandatory and applicable industry specific documentation. Please upload your documentation against each item where applicable. Kindly note that your registration might be rejected should any of the required documents you not have received a membership certificate yet

Mandatory Documents



CK, CM, COR Documents (Reflecting company details, shareholders, members) *

Submit Document

Documents

Upload CK, CM, COR Documents (Reflecting company details, shareholders, members) *

Please enter expiry date as yyyy/mm/dd OR "PENDING" OR "N/A"

BROWSE...

Expiry Date

If document is not applicable to you, or does not have an expiry date, then please select N/A

Applicable



If document is applicable to you, please ensure the box is ticked

Save

IMPORTANT Please SAVE before moving on to the next step.

STEP 8 - REQUIRED DOCUMENTATION

This section requires the submission of mandatory and applicable industry specific documentation. Please upload your documentation against each item where applicable. Kindly note that your registration might be rejected should any of the requirements should you not have received a membership certificate yet

Mandatory Documents



Valid Tax Clearance Certificate *

Submit Document

Documents

Upload Valid Tax Clearance Certificate *

Please enter expiry date as yyyy/mm/dd OR 'PENDING' OR 'N/A'

BROWSE...

- A. Upload the valid tax certificate OR
- B. if you have applied for one, upload proof of application

PIN

PIN Expiry Date

Expiry Date

Applicable

Pending Application

Expection Application Completed Date

A - If you have a valid certificate, complete this section:

OR

B - If you have applied for a tax certificate: please ensure the "Pending Application" box is ticked

please ensure you insert the expiry date

ensure the "Applicable" box is ticked.

enter a date 3 months after the application date

Save

IMPORTANT Please SAVE before moving on to the next step.

Thank You

Contact

South Africa

Johannesburg +27 (0) 11 911 8000

Cape Town +27 (0) 21 943 1000

Durban +27 (0) 31 534 2500

www.excellerate.co.za

